Taxonomy System
Version 5.1
(ATX)

User's Guide

February 1997

Taxonomy System

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Taxonomy System

Description

The Taxonomy System allows you to create diagnosis taxonomies, which are groups of related International Classification of Diseases (ICD) diagnosis codes. A particular disease, such as tuberculosis, may have many ICD diagnosis codes associated with it. If you want all patients who have a tuberculosis-related diagnosis, you would need to include all the ICD diagnosis codes within a taxonomy called, for example, Tuberculosis. ICD reference books should be available from Patient Care Component (PCC) data entry or medical records personnel at your facility so that you may select appropriate codes for your taxonomy. The system allows for an automatically updated list of patients who fall into this taxonomy. Every time a purpose of visit that is one of the ICD codes located within a taxonomy is entered through the PCC data entry process, the patient list for this taxonomy will be updated. Search templates can be created for a taxonomy to store all the patients within that taxonomy and all the purpose of visit entries related to the taxonomy. Also included within this system are the Search Template Comparison System, which has its own user's manual, and FileMan General, which is used for ad hoc retrievals and report generation.

Taxonomy System Structure

This system consists of two files: the Taxonomy file and the Pt Taxonomy file. The Taxonomy file stores the name, description, and ICD codes of a taxonomy. If you decide to store patients that fall under this taxonomy, an entry is made in the Pt Taxonomy file. This entry is the name of the taxonomy in the taxonomy file. There is a multiple field in the Pt Taxonomy file under the taxonomy entry called "patient." It is here that the patients are entered for a given taxonomy. For each patient in the Pt Taxonomy file, there is a visit counter. Each time a patient is seen for a purpose of visit related to a taxonomy, the visit counter is increased by one.

The Taxonomy System is made up of two main menus. Upon entering the system, you will see the following menu displayed on the terminal.

```
                    Taxonomy System


MAIN    Taxonomy Maintenance
RES     Research and Reports
```

Taxonomy Maintenance Menu

This menu contains options to add, modify, and delete taxonomies. There is also an option to indicate that a bulletin (an electronic mail message) should be sent for a taxonomy. An option also exists that allows entry of patients into a separate Pt Taxonomy file that can be prospectively updated. Other options in this menu allow you to remove a patient list for a taxonomy file or there is an option that displays a description of a taxonomy. A list and count of patients within that taxonomy may be obtained. In addition, there is an option used to create Lab Test Taxonomies. These lab test taxonomies are used by the Diabetes Audit Program.

Below is the Taxonomy Maintenance menu:

```
Select Taxonomy System Option: [MAIN] Taxonomy
Maintenance

ADD    Create A Taxonomy
MOD    Modify A Taxonomy
DEL    Delete A Taxonomy
BUL    Enter Bulletin For A Taxonomy
RBL    Remove Bulletin From A Taxonomy
ENT    Enter Patients Into Pt Taxonomy File
REM    Remove Patients From The Pt Taxonomy File
TAX    Description of a Taxonomy
PAT    List Patients Within A Taxonomy
LAB    Enter/Edit a Lab Test Taxonomy
```

Taxonomy Creation

A working definition of a taxonomy is a group of diagnoses that relate to a particular medical disorder or problem. Reference books are available that classify the ICD diagnoses codes. The books should be available from the PCC data entry or medical records personnel at your facility. To utilize this option:

Step 1.   Determine the ICD codes that will fall into this taxonomy.

Step 2.   Enter the name of the taxonomy you would like to create.

Step 3.   Enter a short description of the taxonomy.

Step 4.   If you desire, you can enter a lengthy description of the taxonomy.

Step 5.   Enter ICD codes for this taxonomy.

Sample Session

```
Select Taxonomy Maintenance Option: [ADD] Create A Taxonomy

Select TAXONOMY NAME: [DIABETES]
ARE YOU ADDING 'DIABETES' AS A NEW TAXONOMY (THE 6TH)? [Y] (YES)
BRIEF DESCRIPTION: [DX DIABETES.RELATED DISORDERS]
EXTENDED DESCRIPTION:
1 [Includes gestational and nongestational diabetes]
2
EDIT Option:
ENTER DX: [?]

Enter ICD9 diagnosis code or narrative. You may enter a range of codes
by placing a "-" between two codes. Codes in a range will include the
first and last codes indicated and all codes that fall between. Only
one code or one range of codes at a time. You may also enter "[TAXONOMY
NAME" to select codes already within a taxonomy. You can also "de-
select" a code or range of codes by placing a "-" in front of it. (e.g.
'-250.00' or '-250.01-250.93')

ENTER DX: [250.00-250.11]    250.00    DIABETES UNCOMPL ADULT/NIDDM
...OK? YES// return
250.11    DIAB W COMPL NOS JUVEN/IDDM

ICD codes in this range =>
250.00    DIABETES UNCOMPL ADULT/NIDDM
250.01    DIABETES UNCOMPL JUVEN/IDDM
250.10    DIAB KETOACIDOSIS ADULT/NIDDM
250.11    DIAB KETOACIDOSIS JUVEN/IDDM

Press return to continue return
```

*If a long range of codes is entered, only a screenful of codes and
their descriptions will be displayed at a time. A "< >" will appear
at the bottom of each screen. Enter "^" to stop the display of codes
or return to display the next screenful of codes in the range. Whether
or not you display the entire range of codes, the range of codes will
be accepted as entered by the user.*

```
ICD Code Range(s) Selected So Far =>
1) 250.00-250.11

ENTER ANOTHER DX: [SURVEILLANCE DIABETES]
```
*The user has decided to choose the range of codes that are located
within the SURVEILLANCE DIABETES taxonomy. The code range for this
taxonomy is 250.00-250.93.*

```
ICD Code Ranges) Selected So Far =>
1) 250.00-250.93

ENTER ANOTHER DX: [775.1]    NEONAT DIABETES MELLITUS

ICD Code Range(s) Selected So Far =>
1) 250.00-250.93
2) 775.1
```

```
ENTER ANOTHER DX: [??]
Enter an Item Number from the table above to display code(s): [2]

ICD Codes in this range =>
775.1    NEONAT DIABETES MELLITUS

Press return to continue return

ICD Code Range(s) Selected So Far =>
1) 250.00-250.93
2) 775.1

ENTER ANOTHER DX: return

Is everything okay? Y// return    Answering 'no' here will allow you
to modify the entered range(s)

One moment please ...

Entry of this taxonomy's name will now be made for each code that
falls under this taxonomy in background under Taskman!
```

Taxonomy Modification

This option allows you to change the name of the taxonomy, the brief description, extended description, and ICD codes that you previously entered. If patients are being entered prospectively into the Pt Taxonomy file for this modified taxonomy, those patients who had only the deleted code will be removed from this taxonomy. If a patient has had visits for several of the codes in this taxonomy, a visit counter will be decremented by the number of times the patient had a purpose of visit corresponding to the deleted ICD code. If you add an ICD code (or range of codes) to the taxonomy, the patient list in the Pt Taxonomy file will be updated for purposes of visits involving these newly added ICD codes. Either the patient will be added to the list, if he or she was not previously on the list, or the visit counter will be increased appropriately. The patient list will be updated based on purpose of visits that occurred on or after a date entered in the Starting Date for Patient List field.

Sample Session: The user decides to remove codes 250.30 thru 250.41 and code 775.1 from the Diabetes taxonomy. Then the user decides to add back 250.40-250.41.

```
Select Taxonomy Maintenance Option: [MOD] Modify A Taxonomy
Select TAXONOMY: [DIABETES]
NAME: DIABETES// return
BRIEF DESCRIPTION DX DIABETES RELATED DISORDERS replace return
EXTENDED DESCRIPTION 1)Includes gestational and non-gestational diabetes

EDIT Option: [1] Line one is selected and will be changed by the user to indicate ICD code
changes.
ICD Code Range(s) Selected So Far =>
1) 250.00-250.93
2) 775.1
```

```
ENTER ANOTHER DX: [-250.30-250.41] DIABETES COMA NEC ADULT/
...OK? YES// return

250.50 DIAB OPHTHAL MANIF ADULT/NIDDM
... OK? YES// return

ICD codes in this range =>
250.30    DIABETES COMA NEC ADULT/NIDDM
250.31    DIABETES COMA NEC JUVEN/IDDM
250.40    DIABETES RENAL MANIF ADULT/NIDDM
250.41    DIABETES RENAL MANIF JUVEN/IDDM

Press return to continue return

ICD Code Range(s) Selected So Far =>
1) 250.00-250.21
2) 250.51-250.933)
3) 775.1

ENTER ANOTHER DX: [-775.1] NEONAT DIABETES MELLITUS
... OK? YES// return

ICD Code Range(s) Selected So Far =>
1) 250.00-250.21
2) 250.51-250.93

ENTER ANOTHER DX: [25O.40-250.41] 250.40 DIAB RENAL MANIF ADULT/NIB
... OK? YES// return (YES)
250.41    DIAB RENAL MANIF JW EN/IDDM ... OK? YES// return (YES)

ICD codes in this range =>
250.40    DIAB RENAL MANIF ADULT/NIDDM
250.41    DIAB RENAL MANIF JUVEN/NIDDM

Press return to continue

ICD Code Range(s) Selected So Far =>
1) 250.00-250.21
2) 250.40-250.41
3) 250.50-250.93

ENTER ANOTHER DX: return

Is everything okay? Y// return

One moment please ..
Taxonomy will now be modified (if changes were made) in background by
Taskman.
```

Deletion of a Taxonomy

This option allows deletion of a taxonomy. When you delete a Taxonomy, the patients
stored under this taxonomy in the Pt Taxonomy file will be removed. The taxonomy will
be deleted from both the Taxonomy and Pt Taxonomy file.

Sample Session

```
Select Taxonomy Maintenance Option: [DEL] Delete a Taxonomy
Select TAXONOMY NAME: [DIABETES]  DX DIABETES/RELATED DISORDERS
ARE SURE YOU WANT TO DELETE THE ENTIRE TAXONOMY? YES// return (YES)
The taxonomy will now be deleted in background by TASKMAN.
```

Entry of a Bulletin for a Taxonomy

Selection of a taxonomy within this option will automatically create a bulletin to be sent to the recipients within the designated mail group. A bulletin is an electronic mail message that will be sent whenever a patient has a purpose of visit that is one of the entries within a taxonomy.

This option will create the message for the taxonomy of interest. You may then designate a mail group to whom the bulletin will be sent. If this is a new mail group, you will be asked for the names of the people you would like to have as members of this mail group. Once a mail group has been established, modification of this group must be done with the assistance of the site manager utilizing File Manager option 1. Additional mail groups may be created for this taxonomy's bulletin utilizing the same File Manager option. Within the Bulletin file, select the bulletin that is the name of your taxonomy prefaced by the letters ATX and modify the mail group field. To change a mail group for a bulletin, delete the bulletin for the taxonomy, reenter the bulletin, and designate a new mail group. Deleting the old mail group must be done via the "Remove Bulletin from a Taxonomy" option.

Bulletins should be used only for unusual or special purpose of visits. Otherwise you receive electronic mail very frequently.

With the option "Enter a Bulletin for a Taxonomy," you are asked for which type of visit you want a bulletin sent. Hospitalization only, Ambulatory only, or both Hospitalization and Ambulatory may be identified. This option is used to modify the designated visit types if you desire a change later.

This option will also ask for a location. This location is the location of encounter for a patient visit. Enter a location if you are interested in receiving bulletins for patient visits to that facility only. If you want to receive bulletins regardless of the facility the patient visited, do not enter a location. You will be sent a bulletin for any location where the patient has had diagnosis that falls within the selected taxonomy. The chart number displayed for the patient will be the patient's chart number at the facility at which the patient was treated. If the database does not have the patient's chart number at that facility, the chart number at the facility where the bulletin is generated will be used.

Sample Session

```
Select Taxonomy Maintenance Option: [BUL] Enter Bulletin For A Taxonomy
Select TAXONOMY NAME: [DIABETES]

Select MAIL GROUP: [DIABETES COORDINATOR]

ARE YOU ADDING 'DIABETES COORDINATOR' AS A NEW MAIL GROUP (THE 1OTH)?
[Y] (YES)
The number 10 means the 1Oth mail group on your
computer and should be ignored

ARE YOU ADDING 'DIABETES COORDINATOR' AS A NEW MAIL GROUP (THE 1ST FOR
THIS BULLETIN? [Y]
Select MEMBER: [JONES FELICIA]
ARE YOU ADDING 'JONES FELICIA' AS A NEW MEMBER (THE 1ST FOR THIS MAIL
GROUP)? [Y]
Select MEMBER: [SMITH HOUSTON]
ARE YOU ADDING 'SMITH HOUSTON' AS A NEW MEMBER (THE 2ND FOR THIS MAIL
GROUP) [Y]
Select MEMBER: return
LOCATION: [?]
Enter the visit location for which bulletins are to be sent. No loca-
tion entered means bulletins are sent regardless of where the patient
was seen.
LOCATION: [SAN XAVIER] HEALTH CENTER TUCSON SELLS 000111
BULLETIN SERVICE CATEGORY. B// [?]
   Enter the service category type for which you would like a bulletin
   issued.
   CHOOSE FROM:
   A AMBULATORY
   H HOSPITALIZATION
   B BOTH AMBULATORY AND HOSPITALIZATION
BULLETIN SERVICE CATEGORY: B// [return] BOTH AMBULATORY AND
HOSPITALIZATION

SEND BULLETIN IF RECENTLY SENT: YES// [?]
   Enter if you want another bulletin sent if the same diagnosis was
   entered for this patient within a 30 day period. Choose: YES or NO.
SEND BULLETIN IF RECENTLY SENT: YES// [return]

SEND BULLETIN-1ST VISIT ONLY: YES// [?]
   A 'YES' answer will send a Mail Bulletin ONLY on First Visit
SEND BULLETIN-1ST VISIT ONLY: YES// [return]

VISIT TYPE: CI// [?]
   Enter any Visit Type Code combination for which you wish to receive
   a Bulletin - up to 9 characters
   I=IHS C=CONTRACT T=TRIBE O=OTHER 6=TRIBE/638 V=VA P=TRIBE/COMPACT
   U=URBAN S=STATE
   Example-CI would send bulletins only on CONTRACT & IHS
VISIT TYPE: CI// [return]

Okay, a bulletin will be sent for this taxonomy to the indicated mail
group.
```

Injury Control Bulletin

The Taxonomy System comes with a bulletin already created and ready to use called the Injury Control Bulletin. This bulletin was developed for Injury Control officers and is sent anytime a patient is seen with an injury diagnosis (ICD9 codes 800.0-999.0). In order to 'turn on' this bulletin, the following procedures are required. These procedures should be performed by the Site Manager in conjunction with your local Injury Control officer or other Environmental Health representative.

1. The bulletin called ATX Injury Control Notif is triggered each time an injury-related purpose of visit is entered into the PCC. However, you must first create an Injury Control Mail Group on your system before these bulletins will function. The following steps outline this procedure.

    a) Create a new Injury Control mail group in the Mail Group file through FileMan or by using the appropriate menu option on the Manage Mailman menu. Enter all the appropriate members to this group.

    b) Add the Injury Control mail group to the mail group field of the bulletin ATX Injury Control Notif. This can be done through FileMan or by using the Bulletin Edit option on the Manage Mailman menu.

    c) Using FileMan, edit the Bulletin field of the Taxonomy file for the entry called ATX Injury Control and enter the bulletin ATX Injury Control Notif.

Once the above steps are complete, bulletins are sent every time an injury diagnosis is entered for a patient. You can customize the sending of bulletins in various ways. You can limit bulletins to be sent for specific service categories and/or specific facilities. This is done by editing the Bulletin Service Category or the Location field of the taxonomy entry. Again, your site manager can be of assistance in setting this up.

Remove Bulletin from a Taxonomy

You may stop sending a bulletin for a taxonomy by using this option. If you then decide to have a bulletin sent subsequent to deleting the bulletin, you will need to utilize the Enter Bulletin for a Taxonomy option. As mentioned under the previous option description, to change the mail group for which you want a bulletin sent, use this option to remove the bulletin from the taxonomy, then use the Enter Bulletin for a Taxonomy option.

Sample Session

```
Select Taxonomy Maintenance Option [REM] Remove Bulletin From A Taxonomy
Select TAXONOMY NAME: [DIABETICS]
Are you sure you want to no longer have a bulletin issued for this
taxonomy? NO// [Y]
Okay, the bulletin has been deleted for this taxonomy
```

Entering Patients into the Pt Taxonomy File

All patients who had a purpose of visit that is an ICD Diagnosis code located within the taxonomy you created will be placed in the Pt Taxonomy file under the appropriate taxonomy. This list of patients will be updated automatically when the PCC data entry staff enters a purpose of visit for a patient (via an ICD Diagnosis code) in the V POV file that falls within this taxonomy definition. Either a new patient will be added or, if the patient is already within the taxonomy, a counter that counts the number of visits he or she has had for this taxonomy will be incremented by one. The opposite process occurs when an existing entry in the V POV file is modified.

You will be asked the starting date for the patient list. The date you enter will be the starting date for those patients who had a purpose of visit (POV) related to the selected taxonomy. If the date entered is before the first visit in your database, all patients who have ever had a POV for this taxonomy will appear on the patient list in the Pt Taxonomy file. Since you probably will not know the first visit by a patient in your database, if you want to start at the first visit, enter a date such as January 1, 1960. You may also enter a future date and the list will begin starting on that date. Future dates cannot exceed one year from the current date. All patient lists in the Pt Taxonomy file will be updated prospectively. A prospective lists means that via data entry, whenever a purpose of visit is added to the V POV (Purpose of Visit) file, the patient will automatically be added to the patient list for that taxonomy or their visit counter will be increased by one if the entered ICD Diagnosis code fell within the range of codes in that taxonomy.

If you are interested in patients who have been previously diagnosed with one of the ICD Diagnoses that is within the taxonomy you created, do not enter patients into the Pt Taxonomy file. This option is only for building a list that will be updated as patients visit your facility in the future. Use the Research and Reports menu that is a part of the Taxonomy System or Q-Man to obtain a retrospective list of patients that fall within your taxonomy instead of using this option.

Once patients are entered into the Pt Taxonomy file, you cannot modify the Starting Date for Patient List field. You must go into the Remove Patients From Pt Taxonomy File option, remove the patient list, and then return to this option and enter new information into this field.

Sample Session A: User wants any patient who had a past visit for a diagnosis that falls within this taxonomy to be added to the Pt Taxonomy file. Prospective updating will thus begin immediately.

```
Select Taxonomy Maintenance Option: [ENT] Enter Patients Into Pt
Taxonomy File
Select TAXONOMY NAME: [DIABETES]
STARTING DATE FOR PATIENT LIST: [?]
   ENTER THE DATE YOU WOULD LIKE THE PATIENT LIST TO BEGIN. YOU MAY
   START FROM ANY DATE IN THE PAST OR A FUTURE DATE UP TO ONE YEAR FROM
   TODAY.
   Examples of Valid Dates:
         JAN 20, 1957 or 20 JAN 57 or 1/20/57 or 012057
         T (for TODAY), T+l (for TOMORROW), T+2, T+7, etc.
         T-1 (for YESTERDAY), T-3W (for 3 WEEKS AGO), etc.
   If the year is omitted, the computer uses the CURRENT YEAR.
STARTING DATE TO BEGIN PATIENT LIST: [JAN 1 1960]

Entries for this taxonomy into the Pt Taxonomy file will now occur via
TASKMAN in background!
```

Sample Session B: You do not want past patients entered into the Pt Taxonomy file for this taxonomy. You elect to have the patient list begin on a future date. For this example, we will use the date April 30, 1991. Starting on that date, updating of the patient list for this taxonomy will begin. You may modify this date as long as updating of this patient list has not begun. In this example, the date may be modified prior to April 30, 1991.

```
Select TAXONOMY NAME: [DIABETES]
STARTING DATE FOR PATIENT LIST: [4/30/91]
```

Removing Patients From the Pt Taxonomy File

If you placed the patients in the Pt Taxonomy file under a taxonomy, you can delete those patient entries with this option. You can use the Enter Patients into Pt Taxonomy File option to reenter patients under this taxonomy, if you desire.

```
Select Taxonomy Maintenance Option: [REM] Remove Patients From The Pt
Taxonomy File

Select PT TAXONOMY NAME:  [DIABETES]
ARE YOU SURE YOU WANT TO DELETE THE PATIENT LIST FOR THIS
TAXONOMY? YES// return  (YES)
DONE!
```

Description of a Taxonomy

A description of a taxonomy and the range of ICD codes within that taxonomy will be displayed using this option.

```
Select Taxonomy Maintenance Option: [TAX] Description of A Taxonomy
Select TAXONOMY NAME: [DIABETES]

NAME: DIABETES    BRIEF DESCRIPTION: DX DIABETES RELATED DISORDERS
  ENTER PST INTO PT TAX FILE: YES    CREATOR: JONES, FELICIA
  STARTING DATE FOR A LIST: JANUARY 1, 1960
  CREATED BY TAXONOMY SYSTEM: YES     TYPE: RANGE
  ENTRIES IN TAXONOMY FROM FILE: ICD DIAGNOSIS
  EXTENDED DESCRIPTION: Includes non-gestational ICD Diagnosis codes for
  diabetes
LOW ICD: 250.00        HIGH ICD: 250.21
LOW ICD: 250.40        HIGH ICD: 250.41
LOW ICD: 250.40        HIGH ICD: 250.93
```

Listing of Patients Within a Taxonomy

This option provides a list of all the patients within a taxonomy if you have asked for patients to be entered into the Pt Taxonomy file. It will also count all the patients within a taxonomy.

Sample Session

```
Select Taxonomy Maintenance Option: [PAT] List Patients Within A
Taxonomy
Select PT TAXONOMY NAME: [DIABETES]
DEVICE:  RIGHT MARGIN: 80// return

PATIENT TAXONOMY LISTING            Nov 10, 1988 14:31 Page 1
----------------------------------------------------------------------

TAXONOMY name: DIABETES

BECKMAN,FLORENCE
WASHINGTON,HENRY
SNEAD,DEE
SMITH,TERESA
SNEAD,DARLENE
HOLOWAY,PENNY
HARRISON,THERESA
JONES,ALEXIS
----------------------------------------------------------------------
Count 8
```

Enter/Edit a Lab Test Taxonomy

This menu allows you to enter or edit a laboratory test taxonomy. A lab test taxonomy is similar to an ICD taxonomy except that it stores lab test names and allows you to select a site and/or specimen appropriate for that test. At this time, the only systems using lab test taxonomies are the Diabetes Audit Program and the Patient Data Fetcher.

Sample Session

```
Select Taxonomy Maintenance Option: [LAB] Enter/Edit Lab Test Taxonomy
It is recommended that you have the laboratory personnel assist you
when entering this data.

Select LAB TAXONOMY NAME: [CHOL TAX]
ARE YOU ADDING 'CHOL TAX' AS A NEW LAB TAXONOMY (THE 2ND)? [Y] (YES)
BRIEF DESCRIPTION: [?]
Answer must be 3-50 characters in length.
BRIEF DESCRIPTION: [CHOLESTEROL TAXONOMY]
Select LAB TEST: [?]
YOU MAY ENTER A NEW LAB TESTS, IF YOU WISH
ANSWER WITH LABORATORY TEST NAME, OR LOCATION (DATA NAME)
DO YOU WANT THE ENTIRE 953-ENTRY LABORATORY TEST LIST? [N] (NO)
Select LAB TEST: [CHOLESTEROL]
Select SITE/SPECIMEN: [?]
ANSWER WITH SITE/SPECIMEN
YOU MAY ENTER A NEW SITE/SPECIMEN, IF YOU WISH
ANSWER WITH TOPOGRAPHY FIELD SYNONYM, OR SNOMED CODE, OR ABBREVIATION
DO YOU WANT THE ENTIRE 8539-ENTRY TOPOGRAPHY FIELD LIST? [N] (NO)
Select SITE/SPECIMEN: [BLOOD]
Select LAB TEST: return
```

Research and Reports Menu

This menu has options that allow you to search the database for data related to the patients and visits contained within a taxonomy. You can create search templates to store the patients or purpose of visit entries contained within a taxonomy. You can then search other files and compare these newly created search templates to the template related to the taxonomy that is of interest to you. The Search Template Comparison System option is also located on the Research and Reports menu (a separate user manual is available for this system). This option allows you to compare search templates linked to various files. See the help frames for this option for a more detailed explanation of this system. FileMan (General) is also available on this menu to allow for ad hoc retrievals and report generation.

```
Select Taxonomy System Option: [RES] Research and
Reports


PAT    Create Search Template (Linked To Patient File)
POV    Create Search Template (Linked To V POV File)
STS    Search Template System
FMG    FileMan (General)
```

Creating a Search Template (Linked to the Patient File)

A template will be created with the names of all patients who have had at least one visit associated with the taxonomy of interest. This will occur whether or not patients were entered into the Pt Taxonomy file. The template can then be used by the Search Comparison Utility or by the Print option of FileMan (General). To utilize the template within the Print option, enter the Patient file as the file to print from. When you are prompted "SORT BY: NUMBER//," enter the name of the template that you created preceded by a left bracket. You can then do a sort based on the patients within the template.

Using the print option is an easy way of listing the names of the patients who fall under the taxonomy if they were not entered into the Pt Taxonomy file. It is recommended that you do not enter the patients into the Pt Taxonomy file (the option is located on the Taxonomy Maintenance menu) if you are not interested in patients being added prospectively to the Pt Taxonomy file.

Sample Session A: In this example, there is not a patient list in the Pt Taxonomy file being updated. If a patient came to the clinic for bubonic plague during the time frame that you specified, the patient's name will be stored in your search template.

```
Select Research and Reports Option: [PAT] Create Search Template
(Linked To Patient File)

Select TAXONOMY NAME: [BUB] ONIC PLAGUE Tracks bubonic plague patients

Select SEARCH TEMPLATE: [BUBONIC PLAGUE PTS]
ARE YOU ADDING 'BUBONIC PLAGUE PTS' AS A NEW SORT TEMPLATE? [Y] (YES)
DESCRIPTION:
1 [Plague patients who had a visit (ICD code) 020.0]
2 [October 1 1988 - September 30 1989]
3
EDIT Option:
SORT TEMPLATE NAME: BUBONIC PLAGUE PTS return

Enter a range of visit dates from which to extract entries:
Enter beginning visit date: FIRST//[October 1 1988] (OCT 01, 1988)
Enter ending visit date: LAST//[September 30 1989] (SEP 30, 1989)

Do you want to queue the search template creation to another device?
NO//[Y] (YES)

QUEUE TO PRINT ON DEVICE: HOME//[4]

REQUESTED START TIME: NOW (or a time after working hours)// return
```

Sample Session B: If a patient list for this taxonomy exists in the Pt Taxonomy file, choice 1 will be presented. If you want your search template to include patients who were seen for bubonic plague earlier than the start date in the Pt Taxonomy file, select choice 2.

```
Select Research and Reports Option: [PAT] Create Search Template
(Linked To Patient File)
Select TAXONOMY NAME:[BUBONIC PLAGUE] Tracks bubonic patients

Select, by number, one of the following:
1 Create a search template that will contain a list of all patients pt
taxonomy file. This list of patients starts with the visit date Nov 6,
1989.
2 Create a search template of patients seen during a range of visit
dates. These patients will have had a purpose of visit that falls
within this taxonomy.
Your choice (1 or 2): [1]

Select SEARCH TEMPLATE: [ALL 11/5 BUBONIC PTS]
ARE YOU ADDING 'AFTER 11/5 BUBONIC PTS' AS A NEW SORT TEMPLATE? [Y]
(YES)
DESCRIPTION:
1  [POV AFTER 11/5/89]
2
EDIT Option:
SORT TEMPLATE NAME: BUBONIC PLAGUE PTS// return
Do you want to queue the search template creation to another device?
NO// return (NO)
There was 2 entry in the AFTER 11/5 BUBONIC PTS template.
```

Creating a Search Template (Linked to the V POV File)

This option will go through the V POV (Purpose of Visit) file and find purpose of visit entries that are within the taxonomy of interest. These V POV entries will be stored in a search template linked to the V POV file.

Note: You will be asked for a range of visit dates from which entries from the V POV file will be selected for this taxonomy.

Sample Session: You may want to store the purpose of visit entries from the V POV (Purpose of Visit) file for patients who were diagnosed with Bubonic Plague.

Once again, you will be asked for a date range.

```
Select Research and Reports Option: [POV] Create Search Template
(Linked To V POV File)

Select TAXONOMY NAME: [BUBONIC PLAGUE]

Select SEARCH TEMPLATE: [POV OF BUBONIC PLAGUE PTS]
ARE YOU ADDING 'POV OF BUBONIC PLAGUE PTS' AS A NEW SORT TEMPLATE? [Y]
(YES)
DESCRIPTION:
1  [ICD CODE 020.0]
2

EDIT Option: return
SORT TEMPLATE NAME: POV OF BUBONIC PLAGUE PTS Replace return

Enter a range of visit dates from which to extract entries:
Enter beginning visit date: FIRST// return
Enter ending visit date: LAST// [September 30] (SEP 30,1989)

Do you want to queue the search template creation to another device?
NO// [Y] (YES)

QUEUE TO PRINT ON DEVICE:  HOME// [4]

REQUESTED START TIME: NOW// return
```

Search Template System

This menu has options that allow you to create search templates either thorough the FileMan Search option or manually. The search template comparison utility is available. You can also delete and add entries to existing search templates that you have created. Included on this menu is the FileMan (General) option.

Note: If you create a search template via the search template utility or via the option that allows creation of a search template manually, there will be no search logic associated with these templates. Search templates created via the FileMan Search option

have search logic stored with them. This means that you can utilize a FileMan-created search template's search logic within the search option of FileMan, but not one that you created outside of FileMan.

FileMan General

FileMan General is a menu that contains the following options:
1 Search File Entries
2 Print File Entries
3 Inquire to File Entries
4 Statistics
5 List File Attributes

The search and print options allow ad hoc reports to be created. The inquire option allows you to see entries within a file. The statistics option is a menu that, when appropriate, allows the creation of a histogram or scattergram, or gives basic mathematical statistics for a report that was generated by the print or search option. The statistics options must be run just after a report is generated because results will not be saved once another report is printed. The statistics option cannot be used if a report is queued to a printer.

"List File Attributes" displays the fields and attributes of those fields that make up a FileMan file. This is known as the data dictionary of the file.

Setup of Injury Control Bulletin System

Taxonomy System Version 5.1

Local mailman must be running in order to take advantage of this bulletin system.

The following actions should be performed by the Site Manager in conjunction with the local Injury Control officer or other OEH representative.

1. The Taxonomy System, version 5.1, comes with a bulletin AIX Injury Control Notif, which is triggered each time an injury-related purpose of visit is coded into the PCC. Bulletins are mail messages sent by the Taxonomy System to provide information for members of a mail group. If you have not created an injury control mail group, you must create a mail group for this bulletin on your system. Set up the mail group and bulletin as follows:
    a) Create the mail group in the Mail Group file. Add mail group members to this mail group.

    b) Then go into the Bulletin file and add this group to the ATX Injury Control Notif bulletin.

    c) Select option 1 of File Manager and edit the Bulletin field in the Taxonomy file for the ATX Injury Control taxonomy. Enter ATX Injury Control Notif as a value for this field if your site wants bulletins sent to notify appropriate users of injuries.

2. Customize the issuing of a bulletin as follows:
    a) Select option 1 of File Manager and edit the Bulletin Service Category field in the Taxonomy file for the ATX Injury Control taxonomy. Selecting Hospitalization will more likely ensure that users will be notified about severe injuries only.

    b) Also, edit the Location field for this taxonomy. If you want bulletins sent for this taxonomy from only one facility (location of encounter), enter that facility's name in this field. If you want bulletins sent regardless of where the patient was seen for their injury, do not enter a location into this field.

3. Some sites may want to edit the ICD codes sent with the ATX Injury Control taxonomy. Do so as follows:
    a) Go into programmer mode and set the variable DUZ=0 i.e. S DUZ=0.

    b) Then D^AATXEMP and modify the ICD code ranges. Remove the "F" code ranges as they will never be used by the data entry staff for a purpose of visit. They are used by the cause of injury field, which is not utilized by this bulletin system.